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## The Symptomatic Nature Of Past Destination Choice Among Surf Tourists

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# The Symptomatic Nature Of Past Destination Choice Among Surf Tourists

## Abstract

Surfing has developed to become a major industry, both within the leisure and the tourism sector. While surfers themselves can be viewed as a homogeneous segment characterised by their common interest for the sport, there clearly exists a wide variety of surfers with very different demographic characteristics, lifestyles or even motives for surfing. The aims of this paper are (1) to review past attempts to profile the surfer segment in general and to determine existence and describe the nature of surfer segments, and (2) to suggest a novel approach of segmenting the surfer market, by analysing the pattern of past destination choices, where so far pure profiling was conducted.

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# THE SYMPTOMATIC NATURE OF PAST DESTINATION CHOICE AMONG SURF TOURISTS

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# THE SYMPTOMATIC NATURE OF PAST DESTINATION CHOICE AMONG SURF TOURISTS

## ABSTRACT

Surfing has developed to become a major industry, both within the leisure and the tourism sector. While surfers themselves can be viewed as a homogeneous segment characterised by their common interest for the sport, there clearly exists a wide variety of surfers with very different demographic characteristics, lifestyles or even motives for surfing. The aims of this paper are (1) to review past attempts to profile the surfer segment in general and to determine existence and describe the nature of surfer segments, and (2) to suggest a novel approach of segmenting the surfer market, by analysing the pattern of past destination choices, where so far pure profiling was conducted.

## INTRODUCTION

Buckley estimates the economic scale of the global surf industry to be US\$10 billion per annum and suggests that this is made up of three main components, those being the sale of surf-branded clothing, the manufacture of surfboards and accessories, and surf related travel costs (2002a: 407). The third component identified by Buckley represents the focus of this paper. What patterns of travel behaviour can be identified among surfers and how can this information be of use to the industry that facilitates the experience?

There are very few investigations into the market of surf tourists. Those that have been done include that by Poizat-Newcomb (1999), which focused on the historical and anecdotal perspective of surfing as a sports tourism activity in Puerto Rico but did not provide empirical insights into the marketplace. Another relevant study was conducted by Farmer (1992). This described the motivations, values and culture of surfers in California, but based the findings on a small sample of only 50 recreational surfers. More recently, the study by Buckley (2003a, 2003b) emphasized the surf tourism industry perspective and investigated the concept of carrying capacity, especially in regard to the environmental impacts. The relevance of these papers to this current study is that surfers can be indeed be differentiated from a larger population of recreationists in that they may be described as either a specific “subculture” (Poizat-Newcomb, 1999, p. 8) or “scene” (Farmer, 1992, p. 247), and are supported by a substantial surf tourism industry being made up of surf-branded clothing, manufacture of surfboards, wetsuits and accessories, and travel costs (Buckley, 2002, p. 407). While none of these studies attempt to segment the market of surf tourists, the study conducted by Dolnicar and Fluker (2003) provided a demographic profile and psychographic segmentation model of surf tourists. This current study builds upon this Dolnicar/Fluker work by using the same data set, but using a segmentation method other than psychographic. The emphasis in this study is on the behavioural characteristics of the surf tourist, more specifically, their past destination choice.

The term surf tourism as used in this study follows the definition by Fluker (2003:7):

Surf tourism involves people travelling to either domestic locations for a period of time not exceeding 6 months, or international locations for a period of time not exceeding 12 months, who stay at least one night, and where the active participation in the sport of surfing, where the surfer relies on the power of the wave for forward momentum, is the primary motivation for destination selection.

## METHOD

The data used in this study consists of 430 respondents who completed an online-survey placed on the Internet by the Surf Travel Company, a Sydney based tour operator specializing in surf travel. Visitors to the website (<http://www.surftravel.com.au/>) were given the chance to win a surf holiday to the Mentawais (located in Indonesia) if they successfully completed the survey instrument. One block of questions focussed on the surf destinations these surfers had visited in the past. This multivariate binary information on the behaviour of surf tourists is used as the segmentation base in this study.

This destination information - which is an indicator of past destination choice behaviour - consists of 30 'yes' or 'no' statements, where 'yes' means that the respondent has previously visited the surf destination indicated. The following 30 surf destinations, selected because historically they were the most popular chosen by clients of The Surf Travel Company, included: Bali, Central Sumbawa, Central/South America, Fiji Islands, Garajagan, Hawaii, Hinako Islands, Lombok, Maldives, Mentawai Islands, Nias, North America, North Coast New South Wales, North Western Australia, Nusa Lembongan, Other Indonesia, Other Java, Philippines, PNG, Queensland, South Africa, South Australia, South Western Australia, Sumatra, Tahiti, Telo Islands, Timor/Sumba, Tonga, Victoria and West Sumbawa.

In addition to this behavioural information, 14 categories of descriptive data were also collected relating to the respondents demographic characteristics (education, income, age, gender, surfing ability and years spent surfing), their travel behaviour in general (typical length of stay, companions they travel with, and daily expenditure), and preferences regarding the surfing conditions (preferred wave size and type, the regularity of surf travel undertaken, and importance of seeking new destinations).

## METHODOLOGY

Self-organising feature maps (Kohonen, 1984) were chosen as algorithm to partition the empirical data set in order to derive homogeneous sub-groups of consumers as they rendered superior results in comparative studies based on artificial segmentation data sets (Dolničar *et al.*, 1998). Such unsupervised neural networks have the advantage of neighbourhood learning as compared to the most frequently used clustering algorithm (Baumann, 2000; Dolnicar, 2002), k-means. This leads to a topological map of the resulting groups of respondents, in this case destination choice segments among surfers. The best of 100 randomly drawn starting points were chosen to start the neural network learning process and 90 epochs of learning were allowed before finally assigning each respondent to a segment. Cluster numbers of between 3 and 10 rendered similar stability results on the basis of 50 repetitions. The solution with six segments was chosen, because it was managerially most useful in the trade-off

between distinctiveness and size. Software freely available at the homepage of the Institute of Tourism and Leisure Studies at the Vienna University of Economics and Business Administration (<http://charly.wu-wien.ac.at/software/>) was used.

The limitation of this study from the methodological point of view is the fact that only 430 respondents were available, and that 30 variables (surf destinations) were used. The dimensionality of the data is too high to base managerial decisions upon. Furthermore, the participation in the study was guided by self-selection and is therefore very unlikely to capture a representative sample of the surf tourist population. Thus the purpose of this study cannot claim to go beyond an initial investigation of the issue. However, the findings resulting from this study can be used to generate strong hypotheses for a follow-up study with a larger sample size, more appropriate for the high data dimensionality.

## RESULTS

The results of the analysis revealed six distinct segments of surf tourists based on their past surf destination patterns. Eight of the 14 categories of descriptive data showed significant differences (at the 95 percent significance level, measured by ANOVA or Bonferroni-corrected Chi-square tests) between the six segments. These were age, years spent surfing, length of stay spent at surf destinations, preferred wave type, regularity of taking surf trips, destination novelty, education level and income. Of the descriptive categories that had no significant differences, it can be said that surfers from all groups identified themselves as being at either an intermediate (41.5 percent) or advanced level (45 percent) of surfing, that 60 percent of them preferred waves between four and six feet in height, that 47.5 percent travelled with between one and four friends, that 65 percent spent between AUS\$21 and AUS\$100 per day, and that 74 percent preferred to move through a variety of areas within a particular surf destination. This sample is also dominated by males with between 90 and 98 percent of them being of that gender.

Segment 1, which represents 10 percent of the respondents, and hereafter referred to as 'Indo-centrics', showed a greater tendency for visiting surf destinations such as Bali, Nusa Lombok and Lombok. It should be noted that the percentages used to describe the size of the group in the sample is problematic when it is extrapolated to the total population of surf tourists, as the sample drawn may not be representative. Based on the significantly different descriptive data collected for the Indo-centrics, it was found that they were among the youngest surfers with an average age of 27. It is interesting that 56 percent of these surfers usually stayed for between two and four weeks at the destination, and that 23 percent stayed for between 5 and 8 weeks. This represented the group with the longest length of stay. Additionally, 67 percent of them prefer challenging hollow waves which is third in a scale ranging from fun beach breaks, easy points and reefs, challenging hollow waves and thick grinding barrels. These challenging hollow waves are typical of many surf locations in Indonesia. Many of the Indo-centrics (40 percent) undertake surf travel more than once a year, while 33 percent of them at least once per year, and for their surf holidays, 49 percent of them prefer to seek new countries with new breaks.

The second segment, representing 24 percent of the sample, had a strong representation of American surf destinations including Central/South America, Hawaii and North America.

These ‘American-centric’ surfers represent some of the most experienced surfers as 31 percent have surfed for more than 20 years and have an average age of 33 years. Half of this segment prefers to surf easy points and reefs, and 33 percent prefer to more dangerous challenging hollow waves. There is an even spread among this group in regard to the regularity of taking surfing holidays with 34 percent of them going more than once per year, 27 percent going once a year on a regular basis, and 28 percent going on irregular occurrences. The American-centrics represent the largest proportion of surfers (57 percent) who prefer to seek new countries and new breaks.

The ‘Western Australia/Indo-centrics’ are the third segment, and the smallest in terms of constituents (8 percent of the sample), to be identified. Past surf destinations frequented more, on average, by this segment, compared to the other 5 segments, include South Western Australia, North Western Australia, and Bali. One of the interesting findings with this segment is that 64 percent of them prefer waves found at easy points and reefs. This represents the largest percentage of the six segments preferring this type of wave. They are also very active surf tourists with 58 percent of them taking surf holidays more than once a year on a regular basis.

The fourth segment identified, based on past surf destination choice, are coined the ‘Australian-centrics’. Making up 16 percent of the sample, the Australian-centrics surf more on average than the other groups at Queensland, North Coast of New South Wales and Victoria. These surfers are fairly evenly divided between those preferring easy points and breaks (47 percent) and those preferring challenging hollow waves (41 percent), while half of them prefer travelling to new destinations where they can seek new surf breaks.

The ‘Global-centrics’ appear to surf at as many destinations as they can. At 17 percent of the sample, they are not only the most diverse in terms of where they have surfed in the past, but also the most prolific in terms of how often they undertake surf holidays as 59 percent of them travel more than once a year on a regular basis. They are similar to four of the other segments in that just over half of them (54 percent) choose to seek new countries and new breaks. It should be noted that this group may be a symptom of answer tendencies by the respondents (i.e. potential false reporting by the respondent) and should be interpreted with care.

The final segment to be described, which represent 25 percent of the sample, mainly undertake surf holidays in Queensland (QLD) and the North Coast of New South Wales (NSW) in Australia. Named the ‘QLD/NSW-centrics’, these surfers are notable in that they take surf holidays on the most irregular basis compared to the other segments. Not only do 38 percent of them travel for surfing on an irregular basis, but 42 percent of them choose to return to a favourite spot.

## **CONCLUSIONS, LIMITATIONS AND FUTURE WORK**

Based on empirical survey data, six behavioural surf tourist segments were clearly identified. These segments were distinct both with regard to their past surf destination choice as well as their descriptive characteristics. From this, it can be said that past surf destination choice is symptomatic of descriptive indicators such as the years spent surfing, length of stay spent at

the surf destination, preferred wave type, regularity of undertaking surfing holidays, the importance of destination novelty, education level and income.

Those tour operators that design packages for surf tourists may wish to take note of the different requirements of these segments. For example, surfers such as those represented in the Indo-centric segment, may be more likely to undertake self-organised surf trips as free independent travellers. Their involvement with elements of the tourism industry would perhaps be limited to booking flights and other transportation requirements. Reasons for this include the fact that these people travel for surf on a regular basis, so they are going to be very knowledgeable about various destinations either from word of mouth or their own research. While they spend a similar amount of money per day compared with other groups, they do stay for longer. Thus, the total spend of this group is significant in terms of export earnings for various surf destinations that have the required wave type (challenging hollow waves). Regional tourism authorities, such as those in under-represented surf tourist destinations in the South-Pacific such as Fiji or Tonga, need to consider and promote their natural resources such as wave type and size in order to attract this market.

The length of stay for all other groups was mostly less than 4 weeks, with some groups such as the American-centrics, Western Australia/Indo-centrics and QLD/NSW-centrics preferring trips of less than 2 weeks. This is most likely to be the length of time these people can take time of work for a dedicated surf holiday. Tour operators need to design surf tours that create a good in terms of this time frame, but also in terms of the type of waves that are available in certain destinations. For example, most (64%) of the Western Australia/Indo-centrics prefer easy points and reefs. It would not be wise to offer them packages to locations known either for fun beach breaks or thick grinding barrels. Indeed, it would be unwise to offer any packages offering thick grinding barrels (the most challenging of the four wave types shown in the survey instrument), as very few of the 430 surfers selected this as their wave of choice. One opportunity that does exist is to present current surf tourism customers tours to new destinations, as nearly half of all groups are interested in going to new countries and seeking new breaks.

As mentioned previously, these are three methodological limitations to this study. The first is the dubious representativeness of the data. The second is the small sample size, especially given the high data dimensionality. Therefore the findings of this study should be used as hypothesis generating for future large-scale follow-up studies. Thirdly, the data collected does not identify the place of residence for the respondents. This has implications to the findings in regard to the geographic proximity of the respondent to different surf destinations and the amount of annual leave available.

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